



Update on Electric Drive Unit Production

Following my last report on May 27, I have received many phone calls and texts from members asking questions about GM's re-adjusted timelines for electric drive unit production. There have also been numerous media reports published, including some of the information I previously relayed to members.

I want to restate my message from May 27, to ensure everyone is clear: other than signalling a potential delay in e-drive unit work, GM has provided no written confirmation of its plans or its timelines. I have communicated to the company the urgent need to receive this detailed information, in writing, and expect a response shortly. More information will be provided to the members at that time.

I also want to take a moment to address some of the questions I've been asked about the broader EV transition and what this means for our members.

It is fair to say that none of us have experienced an industrial transformation of this magnitude, in our lifetimes. We are at the beginning stages of a major shift in automotive technology. Unfortunately, there are more questions right now than answers.

What's clear is that this transition is happening. Since 2021, more than 90% of all announced investment in the North American auto industry (about \$185 billion) is linked to EVs and EV-related programs. What's unclear is how quickly EV adoption will happen. We know that EV sales are still rising, but the pace of sales is slowing. Consumer demand for EVs will be determined by a lot of factors, including price and access to charging infrastructure. Unifor continues to advocate for these and other policies that grow the auto sector (in both internal combustion engine and EV segments) and support workers.

Navigating this road forward is something all autoworkers are faced with, everywhere, not just at GM. Earlier this year, news broke of delays in EV production at Ford Oakville. There have been many stops and starts in EV planning for Stellantis in Windsor, as well as a lengthy retool period announced for Brampton. These same challenges are affecting workers at the Detroit 3 as well as at Volkswagen, Nissan and other automakers in the U.S., and in auto plants throughout Europe, Asia and Latin America.

A smooth transition to EVs was never a likely scenario. How we manage this transition will be the critical test. The good news is that St. Catharines is still earmarked as among the few GM powertrain facilities scheduled to build critical EV propulsion systems of the future. We can't lose sight of that fact.

Once the union has a clear picture of what, exactly, the company is planning we will take immediate and necessary steps to address any challenges it presents to the members. We already have a good foundation on income and job security within our collective agreement. We will explore every option to mitigate the impact this will have on our members. And we will continue to communicate all of this to the members moving forward.

Issued by,

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